

SPORT VOLUNTEER PROJECT

Grantsmanship

Produced by Parks and Recreation Ontario and the Sport Alliance of Ontario with support from the Ontario Trillium Foundation.

- Length of Workshop:** 3 hours (including 15-minute break)
- Registration Package**
(sent in advance):
- Time and Location of Training
 - Name of Trainer
 - Goals of Workshop and Agenda
 - Information about parking, reimbursement of expenses, child care arrangements, accessibility to those with disabilities
 - Resource Links Page (for those who want to review in advance)
- Room Set-Up**
- Table groups with 5 to 7 places at each
 - Resource table
 - Presenter's table
 - Flipcharts and stands (2 if possible)
 - Sample resources on resource table
 - Hand Outs on Tables
- Materials**
- Refreshments (as desired)
 - Name tags
 - Pens and lined paper for each table
 - Flipchart paper, enough for every table
 - Masking tape for posting pages on wall
 - Markers, enough for every table
- Handouts**
- **Effective Proposal Writing**
 - Resource Links Sheet
 - Evaluation Form
 - Participant List (if desired, or if group is large) *Because of privacy concerns, don't share more than names and organizations without express permission from participants to do so.*

Before workshop

Prepare and post on flipcharts:

Agenda

1. Introductions
2. Assess Your Fit for Grants
3. Getting Ready
4. What Makes a Good Proposal
5. Preparing the Pitch
6. Tips for Trillium Applications
7. Other Grant Options
8. Wrap-Up and Evaluation

Goals of the Workshop – At the end of this workshop you will be able to:

1. Be able to assess if your organization should apply for grants.
2. Be able to prepare for and write effective grant proposals.
3. Gain tips to help you approach the Trillium foundation and other granting sources.

Note re: Size of Group

The style of facilitation and kind of exercises you choose from the options below will depend on how many people attend the workshop.

The goal is to ensure that all participants can contribute equally within the time available.

A small group equals two to ten people.

Guidelines for Working Together (examples)

- Equal chance to participate
- Respect and listening
- Finish on time
- Look after your own needs (breaks, refreshments, ask if you don't understand)

You may also want to flipchart for easy reference during the workshop the Introduction guidelines and the main points that are summarized below.

1 Introductions — 15 minutes

Facilitator introduces her/himself, and does 'housekeeping' items, e.g. location of washrooms, refreshments, who to ask about expense questions, etc.

Then review the goals of the workshop and agenda and answer any questions.

Facilitator asks each participant to briefly introduce themselves according to the guidelines for introductions, e.g.

Give your name, group, and why you came to this workshop; including

- one hope or expectation for the session
- one example of a grant proposal the organization has written in the past

If participants haven't written a grant, ask them to name one they have heard about, or one they want to write.

*Flipchart the hopes and expectations and the examples of sponsors in separate lists or **ask a participant to scribe for you**. If you fill more than one page of each, post the pages on the wall.*

If your group is larger than 15 people, do this process in groups of 4 to 8 by giving tables 5-10 minutes to introduce themselves to each other, and share their hopes/expectations and examples of proposals. Then ask each table in turn to name just one hope/expectation and flipchart the responses. Go around the tables again until you cover most of the ideas raised by the tables.

When everyone is finished, review the hopes/expectations list. If some of the hopes/expectations won't be covered by the day's agenda, suggest where people might get the info, e.g. in another workshop or where else they could look. You may want to add some hope/expectations that were mentioned (e.g. have fun!) to the guidelines for working together.

Point out that we will come back to the examples of proposals later, then segue to the next section by reviewing the agenda, pointing out what parts of the agenda will meet the other hopes and expectations.

2 Assess Your Fit for Grants — 15 minutes

Ask for examples that answer the questions below, or make the connection between the categories and the examples of grant proposals that participants gave in the introduction.

DOLLARS

- How much do you want to raise?
- Short-term, playing season?
- When do you need the money

NEED

- Small and quick
- One time
- Next plateau
- Ongoing long term

TIMEFRAME

- Quick cash, project specific?
- Long term 1 -3 years?
- One time vs. ongoing?

BEST SOURCE

- Look to yourselves
- Service clubs, one event
- Grants, foundations, Trillium
- Big investment in planning

Ask participants for examples of kinds of foundations and flipchart them in categories like the ones below (from p. 5. OHCC proposal writing manual) If necessary, prompt or give them the other categories. (N.B.. in addition to 'grant-making' foundations, participants may mention foundations that raise money for a particular cause and do not accept proposals or make grants outside their own cause.)

Kinds of foundations

- Family foundations (e.g. McConnell Family Foundation)
- Government foundations (e.g. Ontario Trillium Foundation)
- Corporate foundations (e.g. Royal Bank of Canada Charitable Foundation)
- Community foundations (normally established to serve a particular geographic area)
- Special purpose foundations (e.g. Hospital for Sick Children Foundation)
- Service club foundations (e.g. Lions, Rotary Club, Shriners etc.).

3 Getting Ready – 15 minutes

Ask participants what steps their organizations have taken or expect to take to prepare for writing grant proposals. If necessary, prompt for some the points below:

- Board concept approval
- Establish who will write, provide info, approve, etc.
- Timeline – Research deadlines & work backwards for timing
 - 3 months – good
 - 6 weeks – doable
 - weeks – crisis
 - Average at least 35 hours work to prepare a proposal
- Collect Information – All Grants
 - Mission, Mandate, Vision
 - Current financial statements & budget
 - Most recent audited statements
 - Incorporation papers, date of & number
 - List of board of directors
 - Annual Report
 - Strategic or business plan

4 What Makes a Good Proposal – 15 minutes

Ask participants to state what in their experience makes a good sales pitch? Ask them to call on a personal experience when they were convinced by reading or hearing a pitch: e.g. What made them buy from a salesperson, give to a cause, agree with their child's or spouse's request, etc. If necessary, prompt for some of the following factors (adapted from p. 11 OHCC manual)

What makes a good sales pitch?

- Short, gets to the point quickly
- Inspiring but plain language
- Goal and outcome clearly stated
- Active rather than passive voice

- Human, emotional, appeal
- Relates to your interests
- Outlines your role /what's expected
- Honest, credible
- Supported by others
- Doable
- Convenient
- Timely

Present the list of components (p. 11 of OHCC manual), and answer questions or explain terms if necessary. The OHCC manual includes more details . Remind participants that funders' requirements may differ from this list and it's important that you do your research and check what each one needs.

Typical Proposal Components

- i Summary
- ii Introduction
- iii Definition of the Issues
- iv Desired Results
 - Outputs
 - Outcomes
 - Impact
- v Resources and Activities
- vi Budget
- vii Evaluation Plan
- viii Sustainability
- ix Conclusion
- x Appendices

Note that other workshops in this series contain information and resources useful to proposal writing (i.e. Corporate Sponsorships, Fundraising, Communication Planning and Media Relations).

5 Preparing the Pitch – 30 minutes

Ask table groups to flipchart a summary of their proposal in point form that answers the questions below. They may want to flipchart the points for display Ask them to keep the factors that make a good pitch in mind.

Summary of Pitch

- What you want to do and why
- Who will do it,
- What will change, including who it will benefit, and how
- Your track record
- The amount of your request to this funder
- What resources or funds are committed or requested from other sources

When they are finished hand out the Proposal Appraisal Tool (p. 20-21 of OHCC manual). Ask for volunteers to share their pitch (maximum 1-2 minute presentation!)and have others comment on them(#11-14 on the Proposal Appraisal are helpful questions) If time allows, have groups improve their pitches, based on the discussion.

BREAK

6

Tips for Trillium Applications — 30 minutes

Walk through a Trillium application form with the group, making the points below.

OTF Deadlines

- March 1st
- July 1st
- November 1st

Response

- 18 – 19 weeks
- Cannot start spending until to hear from OTF

Eligible

- Non-profit organizations
- Charities
- Unincorporated branch
- A First Nation
- A collaborative

Not Eligible

- Corporate for-profit
- Individuals
- Municipalities with pop. over 200k
- Private foundations
- Agencies of Government
- Need as result of government cut-backs

If you don't qualify, try:

- Collaborative application
- Partner with a qualifying organization to apply
- What about a Provincial Sport application & pilot in your catchment area as one of three?
- Consult with Trillium representative

What will Trillium fund?

- Equipment
- Repairs & Renovations
- Training
- Planning

Tips on Questions

Read All Question First

- A 11: Tell us what you want to do with the OTF grant in 50 words maximum.
- B3: Who takes part in your activities (#'s)?
- B4: How do you reach out?
- B5: How do you work with the community?
- B6: Who will benefit?

Initiatives

1. Promote physical activity for people of all ages and abilities.
2. Promote recreational activities for people of all ages and abilities.
3. Enhance and help protect human and ecosystem health.
4. Create conditions for people to reach their full health and well-being potential.
5. Promote cultural and artistic activities for people of all ages and abilities.

No Spell Check

- Application
- Work Plan
- Test each form first

Other Formats

- Budget in word
- Recreate in Excel
- Spell check on Notes to Budget
- Create in your own word doc & then cut & paste
- How to sustain after the grant is complete?
- Track record
- Good volunteers
- New plateau
- Increased registration numbers & fees

Depreciate Capital Equipment

- \$10,000/ 5 yr useful life
- Expense & set aside \$2,000/year
- After 5 yrs sell off at 20%, plus \$10k = \$12 to replace new

Instructions to Groups –

Choose the Trillium question that is most difficult for your group and try to answer it e.g. Decide what numbers make sense for you: e.g. what units of participation measurement *Go around the groups and ask them what question they worked on, and to share one insight or remaining challenge they have.*

7 Other Grant Options — 15 minutes

Review the possibilities for funding offered by the following groups, including where participants can get more information (e.g website address, local reps.)

- Community Foundations
- Kidsport
- Canadian Tire Jumpstart Program
- Municipal Parks and Recreation
- *Big Online
- *Directory of Foundations

**Check if participants can get free access to either of these databases through a local volunteer centre or public library.*

8 Wrap-Up and Evaluation — 15 minutes

Review some of the links on the resource sheet.

Encourage participants to complete and hand in the evaluation forms, and/or do an evaluation round. *For example, a ‘weather report’ where everyone says how they are feeling in the form of a weather report, or ask for their responses – Positives, Negatives and Would change (e.g. +, – and ~) and note them in 3 columns on a flipchart.*

Facilitator thanks those who contributed (organizers, caterers, etc.) and participants, and adjourns.

SUGGESTIONS FOR ONLINE RESOURCE LINKS

<http://www.sportalliance.com/Content/Volunteer%20Resources.asp>

Sports Alliance of Ontario Volunteer Resource Page

<http://www.healthycommunities.on.ca/publications/misc/fundproposal.pdf>

Ontario Healthy Communities Coalition manual on proposal writing 23 pages

http://www.trilliumfoundation.org/cms/en/01_Guidelines_4_Simplified.aspx

Guidelines for the Simplified Application Process – Ontario Trillium Foundation

http://www.kidsport.on.ca/chapters_directory.html

Ontario chapters of Kidsport

http://www.cfc-fcc.ca/who_we_are/list.cfm?id=6

Links to Ontario community foundations

http://www.canadiantire.ca/jumpstart/funding_raise.html

Canadian Tire Jumpstart Program

<http://www.neilsquire.ca/snapfiles/pdf%2ffundraising%2520resource%2520kit.pdf>

A fundraising resource kit for developing a fundraising plan: 27 page manual developed in 2003 by the Neil Squire Foundation “to help smaller to mid-size organizations to understand basic principles of fundraising in a clear and concise manner.”